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ABSTRACT

The general purpose of the occupational analysis is to provide workable, basic information dealing with the many and varied duties performed in the terminal clerk occupation. The document opens with a brief introduction followed by a job description. The bulk of the document is presented in table form. Eight duties are broken down into a number of tasks and for each task a two-page table is presented, showing on the first page: tools, equipment, materials, objects acted upon; performance knowledge (related also to decisions, cues and errors); safety--hazard; and on the second page: science; math--number systems; and communications (performance modes, examples, and skills and concepts). The duties include: applying rates; preparing freight bill; tracing freight; handling overages and shortages to incoming freight; damage, and collections and accounts receivable; storing and retrieving shipment information; and taking all incoming phone calls. A glossary of freight terminal terms is appended. (BP)

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Occupational Analysis

CE 004 199

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TERMINAL CLERK

Instructional Materials Laboratory
Trade and Industrial Education
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5165

AN ANALYSIS OF THE TERMINAL CLERKING OCCUPATION

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FOREWORD

The occupational analysis project was conducted by The Instructional Materials Laboratory, Trade and Industrial Education, The Ohio State University in conjunction with the State Department of Education, Division of Vocational Education pursuant to a grant from the U.S. Office of Education.

The Occupational Analysis project was proposed and conducted to train vocational educators in the techniques of making a comprehensive occupational analysis. Instructors were selected from Agriculture, Business, Distributive, Home Economics and Trade and Industrial Education to gain experience in developing analysis documents for sixty-one different occupations. Representatives from Business, Industry, Medicine, and Education were involved with the vocational instructors in conducting the analysis process.

The project was conducted in three phases. Phase one involved the planning and development of the project strategies. The analysis process was based on sound principles of learning and behavior. Phase two was the identification, selection and orientation of all participants. The training and workshop sessions constituted the third phase. Two-week workshops were held during which teams of vocational instructors conducted an analysis of the occupations in which they had employment experience. The instructors were assisted by both occupational consultants and subject matter specialists.

The project resulted in producing one hundred two trained vocational instructors capable of conducting and assisting in a comprehensive analysis of various occupations. Occupational analysis data were generated for sixty-one occupations. The analysis included a statement of the various tasks performed in each occupation. For each task the following items were identified: tools and equipment; procedural knowledge; safety knowledge; concepts and skills of mathematics, science and communication needed for successful performance in the occupation. The analysis data provided a basis for generating instructional materials, course outlines, student performance objectives, criterion measures as well as identifying specific supporting skills and knowledge in the academic subject areas.

PREFACE

Training of young people in the distributive occupations has been rather narrowly confined to the actual retailing of goods. Relatively little attention has been given to moving goods through the distributive channels between producer and consumer.

The duties and tasks involved in the day to day operations of a motor freight terminal are covered in this book. The size of a transportation organization has a great influence on the number of people required to carry on what is essentially a clerical function. This refers to those duties which are not related to the actual handling of freight, nor of managing.

This clerical function has been broken down into dispatcher and terminal clerk. In a small operation one person might perform both jobs, while in a larger company, from one to three people might share the dispatch operation, and four or more the clerical job.

All of the clerical and dispatch duties and tasks performed in the terminal of a common carrier in the trucking industry are included. Different operations would be necessary in the companies of contract carriers (trucks), the railroad industry or air freight companies. Although the individual tasks might differ, the same basic functions of record-keeping, dispatching, tracing, cashiering, billing and customer service are found in all areas of the transportation industry.

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JOB DESCRIPTION

A terminal clerk is the person responsible for all clerical work done to maintain the necessary records on inbound and outbound freight, including the rating, billing, cashiering, and accounting for receivables.

Duty A Applying Rates

- 1 Determine destination and applicable tariff
- 2 Determine rate base for shipment
- 3 Classify each item of shipment to determine freight classification
- 4 Determine proper rate
- 5 Calculate final freight bill
- 6 Maintain tariff file in current condition

//

(TASK STATEMENT) DETERMINE DESTINATION AND APPLICABLE TARIFF

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Bill of lading from customer Copies of appropriate tariffs and supplements Maps	Read customers bill of lading to determine destination Look up point list in tariffs to see which one governs a shipment to that destination	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u>

MATH - NUMBER SYSTEMS

SCIENCE

Whole numbers [Number recognition]
 Use of Numbers (without calculation)
 Counting, indexing, coding, recording
 Reading maps and schedules

Maintain conscious awareness of the need for a balance
 between tension and relaxation
 Maintain conscious awareness of physical expressions
 basic to peak physical performance
 Maintain conscious awareness of qualities basic to
 optimal mental performance: attention, observation,
 concentration, mental alertness, mental clarity,
 organization

COMMUNICATIONS

SKILLS/CONCEPTS

EXAMPLES

PERFORMANCE MODES

Comprehension
 Detail/Inference
 Informational reports
 Terminology

Tariff
 Bill of lading

Reading

(TASK STATEMENT) DETERMINE RATE BASE FOR SHIPMENT

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Bill of lading from customer Copy of applicable tariff	Look in proper section of tariff to find rate base between point of origin and destination	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Failure to properly read number Possible duplication of points within one state

(TASK STATEMENT) DETERMINE RATE BASE FOR SHIPMENT

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole Numbers [Number recognition] Adding
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Reading	SKILLS/CONCEPTS Comprehension Detail/Inference Informational reports Terminology

(TASK STATEMENT) CLASSIFY EACH ITEM OF SHIPMENT TO DETERMINE FREIGHT CLASSIFICATION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Bill of lading from customer National Motor Freight Classification and Supplements Maps	Consult N.M.F.C. for each item on bill of lading and locate description of commodity being shipped Select proper class for points involved	
<u>DECISIONS</u> Determine freight classification	<u>CUES</u> Bill of lading	<u>ERRORS</u> Misunderstand shippers description of commodity Look on wrong line

(TASK STATEMENT) CLASSIFY EACH ITEM OF SHIPMENT TO DETERMINE FREIGHT CLASSIFICATION

SCIENCE	MATH NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers [Number recognition] Use of Numbers (without calculation) Counting, Coding, Indexing, Recording Estimation techniques (emphasis on linear, area, volume, temperature, weight, liquid, dry) Reading maps and classification schedule
COMMUNICATIONS	
<u>PERFORMANCE MODES</u>	<u>EXAMPLES</u>
Reading	N.M.F.C. Bill of lading
Writing	Classification
<u>SKILLS/CONCEPTS</u>	
	Comprehension Detail/Inference Informational reports Definition Terminology Memo format Classification

(TASK STATEMENT) DETERMINE PROPER RATE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Bill of lading from customer Proper motor freight tariff	Refer to price section of tariff for rate in view of classification and rate base Check supplements for possible volume or commodity rate Mark proper rate on bill of lading	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u>
		Look on wrong line of tariff

(TASK STATEMENT) CALCULATE FINAL FREIGHT BILL

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Bill of lading from customer Adding machine or calculator	Multiply weight by rate and mark resulting charges on bill of lading Add up all charges, mark total on bill Calculate federal tax, and mark on bill Mark final charges on bill	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Addition and multiplication mistakes resulting in incorrect bill

SCIENCE		MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers [Number recognition] Decimals Fundamental Operation (Calculation) Addition, Subtraction, Multiplication, Division Basic Arithmetic Skills and Concepts Finding a percent of a number and what percent one number is of another Use of Computing Devices and Mechanical Aids Calculator -electric	
COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing Reading	Numbers Bill of lading Bill of lading Numbers	Informational reports Penmanship Terminology Comprehension Informational reports Terminology

(TASK STATEMENT) MAINTAIN TARIFF FILE IN CURRENT CONDITION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Expanding post folder Daily supplements of tariffs Basic tariff book	Read all incoming supplements each day Throw away those that do not apply Place all applicable supplements in proper place in files Clear files of any outdated information	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Not doing this task daily (piles up) Throwing away things that might apply

MATH - NUMBER SYSTEMS

SCIENCE

Exhibit capacity to ascertain best service for customer
 Maintain conscious awareness of the need for balance
 between tension and relaxation
 Maintain awareness of physical expressions basic to peak
 physical performance
 Maintain awareness of qualities basic to optimal mental
 performance: attention, observation, concentration,
 mental clarity and organization

Whole numbers [Number recognition]

Use of Numbers (without calculation)
Indexing

COMMUNICATIONS

SKILLS/CONCEPTSEXAMPLESPERFORMANCE MODES

Comprehension
 Detail/Inference
 Terminology
 Definition
 Informational reports

Tariff supplements

Reading

Duty B Preparing Freight Bill

- 1 Collect billing date (from bill of lading)
- 2 Type freight bill
- 3 Distribute copies of freight bill
- 4 Prepare freight bill for mailing

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(TASK STATEMENT)

COLLECT BILLING DATA (FROM BILL OF LADING)

25

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Bill of lading
Electronic calculator

PERFORMANCE KNOWLEDGE

Select pertinent information from bill
of lading
Verify rate clerks extensions

SAFETY - HAZARD

DECISIONS

CUES

ERRORS

Not verifying rate clerks figures
Incorrectly figuring rate clerks
Extensions - may lead to
incorrect bill and irate
customer

(TASK STATEMENT) COLLECT BILLING DATA (FROM BILL OF LADING)

SCIENCE

Exhibit capacity to ascertain best service for customer
 Maintain conscious awareness of the need for balance
 between tension and relaxation
 Maintain awareness of physical expressions basic to peak
 physical performance
 Maintain awareness of qualities basic to optimal mental
 performance: attention, observation, concentration,
 mental clarity and organization

MATH - NUMBER SYSTEMS

Number recognition
 Whole numbers, decimal fractions
 Fundamental Operations (Calculation)
 Addition, Subtraction, Multiplication, Division
 Use of Computing Devices and Mechanical Aids
 Electronic calculator

COMMUNICATIONS

PERFORMANCE MODES

Reading

Writing

EXAMPLES

Bill of lading

Notes for typing bill

SKILLS/CONCEPTS

Comprehension
 Detail/Inference
 Memo format
 Description

(TASK STATEMENT) TYPE FREIGHT BILL

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Bill of lading (or notes on pertinent details) Typewriter Blank freight bill form	Refer to bill of lading Transfer information to freight bill form	
<u>DECISIONS</u> Determine accuracy of information	<u>CUES</u> Bill of lading	<u>ERRORS</u> Typographical errors

(TASK STATEMENT) TYPE FREIGHT BILL

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Number recognition Whole numbers
PERFORMANCE MODES	COMMUNICATIONS
Reading Writing	<u>EXAMPLES</u> Bill of lading (or notes) Typing freight bill <u>SKILLS/CONCEPTS</u> Comprehension Detail/Inference Informational report Typing

(TASK STATEMENT) DISTRIBUTE COPIES OF FREIGHT BILL

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
One original freight bill Seven copies Filing cabinet "Out" basket	Route copies Prepaid freight Original to shipper Origin terminal copy kept by billing clerk Cashier's copy (and money forwarded) Accounting copy with shipment: Destination terminal copy Interline copy Delivery receipt Extra copy Collect freight (cash on delivery) with freight: Original freight bill Cashier's freight bill Remaining copies follow same procedure	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u>

(TASK STATEMENT) DISTRIBUTE COPIES OF FREIGHT BILL

MATH - NUMBER SYSTEMS

SCIENCE

Exhibit capacity to ascertain best service for customer
 Maintain conscious awareness of the need for balance
 between tension and relaxation
 Maintain awareness of physical expressions basic to peak
 physical performance
 Maintain awareness of qualities basic to optimal mental
 performance: attention, observation, concentration,
 mental clarity and organization

Whole numbers
 Number recognition

COMMUNICATIONS

SKILLS/CONCEPTS

EXAMPLES

PERFORMANCE MODES

Classification
 Comprehension
 Informational reports

Freight bills and copies

Reading

(TASK STATEMENT) PREPARE FREIGHT BILL FOR MAILING

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY/ - HAZARD
Original freight bills One copy of each freight bill Envelopes Typewriter "Out" basket Stamps or stamp machine Mailing machine	Type envelopes Stuff envelopes Take to mailing machine Stamp or use stamp machine Mail	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Typographical error Misuse of machine

(TASK STATEMENT) PREPARE FREIGHT BILL FOR MAILING

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition
PERFORMANCE MODES	COMMUNICATIONS
Writing	<u>EXAMPLES</u> Type address on envelope <u>SKILLS/CONCEPTS</u> Typing

Duty C Tracing Freight

- 1 Receive customers' requests (for tracing freight)
- 2 Contact points of origin and intermediate points
- 3 Contact destination point and intermediate points
- 4 Expedite freight
- 5 Advise customer of freight progress
- 6 Keep records of unsettled tracing request

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(TASK STATEMENT) RECEIVE CUSTOMERS' REQUESTS (FOR TRACING FREIGHT)

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Teletype Telephone Telegraph Mail	Check teletype and pick up tracing requests Answer telephone concerning tracing requests Gather pertinent information: Freight bill number Point of origin Consignor's name Destination point Consignee's name Number of pieces of freight Weight Description of freight	
<u>DECISIONS</u> Trace to point of origin or to destination point most probable to start	<u>CUES</u> Pertinent freight data	<u>ERRORS</u> Failing to get accurate information from customer

(TASK STATEMENT) RECEIVE CUSTOMERS' REQUESTS (FOR TRACING FREIGHT)

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension, relaxation, different or clashing values expressed verbally Maintain awareness of physical expressions basic to peak physical performance, the qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization Exhibit qualities of tact, consideration and graciousness, self-confidence, composure, self-control, self-reliance and adaptability Maintain capacity to perceive, quickly integrate and function well in the face of adversity; to cope with conflict behavior Grant appropriate regard for customer's unique needs Listen openly and attentively in communication process	Whole numbers Number recognition Measurement: non-geometric Weight Use of Numbers (without calculation) Coding [Company] Recording
PERFORMANCE MODES	COMMUNICATIONS
<u>Speaking</u> Reading Listening Writing	<u>EXAMPLES</u> Telephone Teletype Letters Telephone Notes on requests <u>SKILLS/CONCEPTS</u> Terminology Clarity Persuasion and sales techniques Comprehension Detail/Inference Terminology Discriminate facts Note taking Recognize opinions Concentration Memo format Description Terminology Clarity

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(TASK STATEMENT) CONTACT POINT OF ORIGIN AND INTERMEDIATE POINTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Telephone Teletype Description of freight	Contact point of origin by phone and/ or teletype Supply information on freight being traced Make notes on information obtained Make arrangements to obtain additional information later in the day if necessary Contact intermediate points and repeat the above if necessary	
<u>DECISIONS</u> Select pertinent information	<u>CUES</u> Freight identification	<u>ERRORS</u> Failing to understand communications on identification of freight or arrangements for further contacts

(TASK STATEMENT) CONTACT POINT OF ORIGIN AND INTERMEDIATE POINTS

SCIENCE	MATH - NUMBER SYSTEMS	
Listen openly and attentively in communication process Exhibit qualities of tact and consideration Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration mental clarity and organization	Whole numbers Number recognition Measurement: non-geometric Weight Use of Numbers (without calculation) Coding [Company] Recording	
COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	Telephone	Terminology Clarity
Listening	Telephone	Discriminate facts Note taking
Reading	Freight descriptions	Comprehension Detail Informational reports Terminology

(TASK STATEMENT) CONTACT DESTINATION POINT AND INTERMEDIATE POINTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Telephone Teletype Description of freight being traced	Contact point of destination by phone and/or telegraph Supply information on freight being traced Make notes on information obtained Make arrangements to obtain additional information later in the day, if necessary	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u>
Select pertinent information	Freight identification	Failing to understand communications on identification of freight or arrangements for further contacts

(TASK STATEMENT) CONTACT DESTINATION POINT AND INTERMEDIATE POINTS

MATH - NUMBER SYSTEMS

SCIENCE

Listen openly and attentively in communication process
 Exhibit qualities of tact and consideration
 Exhibit capacity to ascertain best service for customer
 Maintain conscious awareness of the need for balance
 between tension and relaxation
 Maintain awareness of physical expressions basic to peak
 physical performance
 Maintain awareness of qualities basic to optimal mental
 performance: attention, observation, concentra-
 tion, mental clarity and organization

Whole numbers

Number recognition

Measurement: non-geometric
 Weight

Use of Numbers (without calculation)
 Coding [Company]
 Recording

COMMUNICATIONS

PERFORMANCE MODES

Speaking

Listening

Reading

EXAMPLES

Telephone

Telephone

Freight descriptions

SKILLS/CONCEPTS

Terminology
 Clarity

Discriminate facts
 Note taking

Comprehension
 Detail
 Informational reports
 Terminology

(TASK STATEMENT) EXPEDITE FREIGHT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Telephone Teletype Description of freight Notes on all information obtained from customer and tracing efforts Maps	Determine fastest practical routes and carriers to move freight from existing point to customer Check routes to customer and determine probable delivery date and time Check air freight to customer and determine delivery date and time Check bus lines to customer and determine delivery date and time Check other motor freight carriers and determine delivery dates and time Check contract carriers and determine delivery dates and time Place the best order and start the freight moving	
<u>DECISIONS</u> Determine route	<u>CUES</u> Delivery date needed Delivery date possible	<u>ERRORS</u> Mistakes in judgment could delay delivery time or involve unreasonable costs

(TASK STATEMENT) EXPEDITE FREIGHT

SCIENCE	MATH - NUMBER SYSTEMS
Grant appropriate regard for customers' unique needs Exhibit capacity to ascertain best service for the customer	Whole numbers Number recognition Fundamental Operations (Calculation) Addition, Subtraction, Multiplication, Division Use of Numbers (without calculation) Coding [Company] Basic Arithmetic Skills and Concepts Guess and check method [Time], maps
PERFORMANCE MODES	COMMUNICATIONS
<u>Reading</u> <u>Writing</u> Speaking Listening	<u>EXAMPLES</u> Freight description Notes on requests Telephone Telephone <u>SKILLS/CONCEPTS</u> Comprehension Detail/Inference Informational reports Terminology Classification Memo format Description Informational reports Terminology Terminology Discriminate facts Concentration Note taking

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(TASK STATEMENT) ADVISE CUSTOMER OF FREIGHT PROGRESS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Telephone Teletype Description of freight being traced Notes on information obtained from local terminal, and/or point of origin and intermediate points, and/or destination point and intermediate points	Contact customer by telephone or telegraph Relay information obtained Receive additional requests concerning further disposition of freight if any Arrange for later contacts if necessary Make a memo of any additional instructions including request for expediting freight Continue to advise customer of freight progress until all requests are completed	
<u>DECISIONS</u> Determine disposition of freight	<u>CUES</u> Freight information: local terminal point of origin intermediate points destination point	<u>ERRORS</u> Communications: failure to understand requests for disposition of freight Mishandling of the customer

(TASK STATEMENT) ADVISE CUSTOMER OF FREIGHT PROGRESS

SCIENCE

Exhibit capacity to ascertain best service for customers
 Maintain conscious awareness of the need for balance between tension, relaxation, different or clashing values expressed verbally
 Maintain awareness of physical expressions basic to peak physical performance, the qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization
 Exhibit qualities of tact, consideration and graciousness, self-confidence, composure, self-control, self-reliance and adaptability
 Maintain capacity to perceive, quickly integrate and function well in the face of adversity; to cope with conflict behavior
 Grant appropriate regard for customer's unique needs
 Listen openly and attentively in communication process

MATH - NUMBER SYSTEMS

Whole numbers
 Number recognition
 Use of Numbers (without calculation)
 Coding (Company)

COMMUNICATIONS

PERFORMANCE MODES

Speaking

Listening

Writing

EXAMPLES

Telephone

Telephone

Memos

SKILLS/CONCEPTS

Terminology
 Clarity
 Persuasion and sales techniques
 Discrimination of facts
 Recognize opinions
 Note taking
 Memo format
 Terminology

(TASK STATEMENT) KEEP RECORDS OF UNSETTLED TRACING REQUESTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Notes including pertinent data on all customers requests for tracing Notes on all information gathered through tracing efforts Notes on completed requests Clip board Forms for listing unsettled tracing reports	Match completed requests to original requests List requests with no completion on a form and include all information gathered and pending action Place list on clipboard and place in handy conspicuous place	
<u>DECISIONS</u> Determine unsettled requests	<u>CUES</u> Notes on information in complete	<u>ERRORS</u> Failure to follow up list and complete could cost customers

(TASK STATEMENT) KEEP RECORDS OF UNSETTLED TRACING REQUESTS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition Use of Numbers (without calculation) Recording, Indexing
PERFORMANCE MODES	COMMUNICATIONS
Reading Writing	<u>EXAMPLES</u> Tracing requests Memos on customer requests Tracing report form <u>SKILLS/CONCEPTS</u> Comprehension Detail/Inference Informational reports Terminology Classification Memo format Informational reports Terminology

Duty D Handling Overages and Shortages to Incoming Freight

- 1 Check freight on hand
- 2 Read incoming freight bills to determine overage or shortage (of freight)
- 3 Recount incoming merchandise to compare with statement (freight bill)
- 4 Type overage and shortage reports
- 5 Maintain files of unsettled overages and shortages
- 6 Ship overage material to proper destination
- 7 Handling freight shortages

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(TASK STATEMENT) CHECK FREIGHT ON HAND

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Overage report Freight manifests for time since original shipping date List of pertinent information concerning freight to be traced	Routine procedure for terminal search Read overage report Scan manifests for freight number or number of pieces and weight Match such information to identical information about freight being traced Dock search for expected physical appearance of freight, and identify numbers, addresses, etc.	
<u>DECISIONS</u> Determine freight on hand	<u>CUES</u> Overage report Manifests Dock search	<u>ERRORS</u> Lost freight Incomplete records

SCIENCE		MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization		Use of Numbers (without calculation) Counting, Coding [Company] Number recognition Estimation techniques [volume, size, weight]
COMMUNICATIONS		
<u>PERFORMANCE MODES</u>	<u>EXAMPLES</u>	<u>SKILLS/CONCEPTS</u>
Reading Writing Viewing	Overage report Manifests Memos Dock and packages	Comprehension Detail/Inference Informational reports Terminology Memo format Terminology Describing Detail/Inference Recognition of codes or symbols

(TASK STATEMENT) READ INCOMING FREIGHT BILLS TO DETERMINE OVERAGES OR SHORTAGES (OF FREIGHT)

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Overage/Shortage form from dock Freight bill	Check consignee's name Check point of origin Check shipper's name Check number boxes stated Check weight	
<u>DECISIONS</u> Whether physical recount should be made	<u>CUES</u> Shipper's name unfamiliar Point of origin improbable Overage/Shortage form	<u>ERRORS</u> Decision not to recount when there is actually a mistake

(TASK STATEMENT) READ INCOMING FREIGHT BILLS TO DETERMINE OVERAGES OR SHORTAGES (OF FREIGHT)

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to as/ertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition
COMMUNICATIONS	
<u>PERFORMANCE MODES</u>	<u>EXAMPLES</u>
Reading	Freight bills
<u>SKILLS/CONCEPTS</u>	
Comprehension Detail/Inference Terminology	

(TASK STATEMENT) RECOUNT INCOMING MERCHANDISE TO COMPARE WITH STATEMENT (FREIGHT BILL)

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Pallet Forklift Cartons or boxes Scales Freight bill	Count number of boxes Weigh all boxes when applicable Check each kind of box against number listed Note all differences on bill or temporary form Keep merchandise in question in separate area Opening broken cartons and counting	
<u>DECISIONS</u> Whether and where to move questioned merchandise Whether further physical search to be made at this time	<u>CUES</u> Large containers opened or not full Weight over or under stated Number of boxes different from number stated on form	<u>ERRORS</u> Misreading bill Distractions of counter

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Use of Numbers (without calculation) Counting, Recording Fundamental Operations (Calculation) Addition, Subtraction, Multiplication, Division
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Reading	Freight bill Labels on freight
SKILLS/CONCEPTS	
Terminology Classification	

(TASK STATEMENT) TYPE OVERAGE AND SHORTAGE REPORTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Typewriter Blank overage and shortage report forms Carbon paper Overage and shortage report from dock Freight bill with overage or shortage notations	Put carbons between report forms Type information contained in dock form and freight bill notations onto overage and shortage report forms in duplicate	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Forgotten carbons Carbons placed improperly Typographical error

(TASK STATEMENT) TYPE OVERAGE AND SHORTAGE REPORTS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition

COMMUNICATIONS

<u>PERFORMANCE MODES</u> Writing	<u>EXAMPLES</u> Type reports	<u>SKILLS/CONCEPTS</u> Classification Description Informational reports Terminology

(TASK STATEMENT) MAINTAIN FILES OF UNSETTLED OVERAGES AND SHORTAGES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
File cabinet Computer Overage and storage forms(from dock) Overage and shortage reports	Set up a filing system Put form on file in proper position Retrieve forms to add information Pull files when overage or shortage is settled	
<u>DECISIONS</u> What information is pertinent and should go into files	<u>COUS</u>	<u>ERRORS</u> Placing forms in the wrong place in files Pulling or marking wrong file

(TASK STATEMENT) MAINTAIN FILES OF UNSETTLED OVERAGES AND SHORTAGES

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Use of Numbers (without calculation) Indexing [Numerical] Number recognition
PERFORMANCE MODES	COMMUNICATIONS
<u>Reading</u> Writing	<u>EXAMPLES</u> Overage and shortage Reports and dock forms Numbers on folders Additional information on documents <u>SKILLS/CONCEPTS</u> Detail/Inference Informational reports Terminology Memo format

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(TASK STATEMENT) SHIP OVERAGE MATERIAL TO PROPER DESTINATION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Shipping identification (label, tag, etc.) Typewriter Teletype Company handbook of terminal points and the areas they serve Overage report Free astray bill	Determine from label and handbook terminal point (from receivers address) Type no charge billing to ship overage material to proper terminal Send teletype to destination terminal message regarding actions Send bill to dispatcher for loading of overage	
<u>DECISIONS</u> What is proper destination terminal	<u>CUES</u> Address of final point of receipt	<u>ERRORS</u> Send it to wrong destination terminal

(TASK STATEMENT) SHIP OVERAGE MATERIAL TO PROPER DESTINATION

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition
PERFORMANCE MODES	COMMUNICATIONS
Reading Writing	<u>EXAMPLES</u> Labels Handbooks Type "no charge" bills Teletype message <u>SKILLS/CONCEPTS</u> Comprehension Detail/Inference Informational report Terminology Typing Teletyping Classification Description Informational reports Terminology

(TASK STATEMENT) HANDLING FREIGHT SHORTAGES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Shortage report Teletype Receipts Phone	Check teletype for overages at other terminals Check incoming receipts if you are at point of origin Send teletype to origin terminal or intermediate points Place shortage report in file until receive answer Contact customer to inform him where it is and what will be done (or if it is, as yet, unfound) Expedite shipment when found, if necessary Maintain follow-up until shipment is received by consignee Advise customer of final disposition Mark short report as settled, to remove from unsettled file	
<u>DECISIONS</u> How to properly deal with customer in any situation	<u>CUES</u> Customer attitude Customer request	<u>ERRORS</u> Improper handling of customer Improper dealing with other terminals' personnel

(TASK STATEMENT) HANDLING FREIGHT SHORTAGES

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Use of Numbers (without calculation) Counting, Indexing, Coding [Company] Number recognition Whole numbers

COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	Teletype Shortage reports	Comprehension Terminology Detail/Inference Informational reports Classification Memo format Description Informational report Technical/general vocabulary
Writing	Memos Teletype messages	Clarity of expression
Speaking	Telephone messages	

Duty E Handling Damage

- 1 Inspect incoming material for proper packaging and container damage on receipt or reported damage
- 2 Type and distribute damage reports
- 3 Maintain file of unsettled damage cases
- 4 Receive customer complaints about damaged freight
- 5 Take appropriate salvage or repair action

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(TASK STATEMENT) INSPECT INCOMING MATERIAL FOR PROPER PACKAGING AND CONTAINER DAMAGE ON RECEIPT OF REPORTED DAMAGE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Damage report from dock Actual cartons that are damaged Knife Crowbar Hammer Wire cutter Freight bill	Go to dock area reserved for damaged freight Look at cartons to determine amount of damage Open badly damaged containers to check for merchandise damage (if necessary) Order rewraapping of less badly damaged or improperly packaged items Mark damages on freight bill	
<u>DECISIONS</u> Whether or not to open container	<u>CUES</u> Container with any visible damages Container that rattles when moved Container that leaks	<u>ERRORS</u> Not opening when there is internal damage

(TASK STATEMENT) INSPECT INCOMING MATERIAL FOR PROPER PACKAGING AND CONTAINER DAMAGE ON RECEIPT OF REPORTED DAMAGE

SCIENCE	MATH - NUMBER SYSTEMS
Simple machines used to gain mechanical advantage [Wire cutter - simple machine] Work input, work output, friction and efficiency in simple machines [Wire cutter - simple machine]	Whole numbers Number recognition Use of Numbers (without calculation) Counting
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Reading Viewing Touching Writing	Damage report Freight bill Packages Packages Memo on freight bill
	SKILLS/CONCEPTS Comprehension Informational report Terminology Describing Detail/Inference Discriminate: size, shape; damage Memo format

(TASK STATEMENT) TYPE AND DISTRIBUTE DAMAGE REPORTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Typewriter Damage report forms Carbon paper Envelope Mailing machine or stamps Freight bill with damage notations Claim department address	Transfer all pertinent information from freight bill to damage report form Type original and three copies Put claim department copy in mail or send to claim department Put two copies in current damage file until case is settled Mail one copy to origin terminal	
<u>DECISIONS</u> Decide what information is pertinent	<u>CUES</u> Damage report form	<u>ERRORS</u> Typographical error Inaccurate information on report

(TASK STATEMENT) TYPE AND DISTRIBUTE DAMAGE REPORTS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition Use of Numbers (without calculation) Counting, Indexing, Recording Basic Arithmetic Skills and Concepts Estimation, Guess and check method Measurement: non-geometric Money

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COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing Reading		Type Penmanship Informational reports Terminology Comprehension Detail/Inference Informational reports Terminology

(TASK STATEMENT) MAINTAIN FILE OF UNSETTLED DAMAGE CASES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
File cabinet Two copies of damage report	Develop filing system Put form in file in proper position Retrieve forms to add information Pull files when damage case is settled	
<u>DECISIONS</u> Determine filing system	<u>CUES</u> Efficiency at retrieval	<u>ERRORS</u> Placing forms in wrong place in files Pulling or marking wrong file

(TASK STATEMENT) MAINTAIN FILE OF UNSETTLED DAMAGE CASES

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Number recognition Use of Numbers (without calculation) Indexing
67 PERFORMANCE MODES Reading	COMMUNICATIONS EXAMPLES Damage claims SKILLS/CONCEPTS Comprehension Informational reports Terminology

(TASK STATEMENT) RECEIVE CUSTOMER COMPLAINTS ABOUT DAMAGED FREIGHT

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Phone Letters of complaint	Answer any phone call about damage Get all pertinent information about merchandise in question Dates shipped Origin terminal Exact damage noted Decide what is next thing to be done Arrange for damaged merchandise to be picked up Arrange for on the spot inspection of extended damage	
<u>DECISIONS</u> How to properly deal with each customer What action to take	<u>CUES</u> Type of damage	<u>ERRORS</u> Mishandling of a customer

(TASK STATEMENT) RECEIVE CUSTOMER COMPLAINTS ABOUT DAMAGED FREIGHT

MATH - NUMBER SYSTEMS

SCIENCE

Use of Numbers (without calculation)

Exhibit capacity to ascertain best service for customer
 Maintain conscious awareness of the need for balance
 between tension, relaxation, different or clashing
 values expressed verbally
 Maintain awareness of physical expressions basic to peak
 physical performance, the qualities basic to optimal
 mental performance: attention, observation,
 concentration, mental clarity and organization
 Exhibit qualities of tact, consideration and
 graciousness, self-confidence, composure, self-
 control, self-reliance and adaptability
 Maintain capacity to perceive, quickly integrate and
 function well in the face of adversity; to cope
 with conflict behavior
 Grant appropriate regard for customer's unique needs
 Listen openly and attentively in communication process

Recording
 Whole numbers

COMMUNICATIONS

SKILLS/CONCEPTS

EXAMPLES

PERFORMANCE MODES

Speaking

Listening

Reading

Writing

Telephone

Telephone

Damage reports

Memos

Terminology
 Persuasion and sales techniques
 Discriminate facts, recognize
 opinions, word definition, note
 taking

Comprehension
 Detail/Inference
 Informational report
 Terminology

Memo format
 Terminology
 Description

(TASK STATEMENT) TAKE APPROPRIATE SALVAGE OR REPAIR ACTION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Damaged merchandise Telephone or teletype Inspection report	Contact claim agent for instructions on proper handling Send material to claim agent's office Sell merchandise locally and forward receipts Free astray billing to sent shipment to claim agent Check with claim agent on proper selling price of material Arrange to return merchandise to manufacturer for repair or replacement	
<u>DECISIONS</u> Determine appropriate action	<u>CUES</u> Interested buyer at terminal Claims agent's instructions	<u>ERRORS</u> Loss of revenue

(TASK STATEMENT) TAKE APPROPRIATE SALVAGE OR REPAIR ACTION

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization Grant appropriate regard for customer's unique needs	Whole numbers Decimal fractions Use of Numbers (without calculation) Counting, Recording Number recognition Basic Arithmetic Skills and Concepts Estimation, Guess and check method, Rule of thumb, [Appraisal]
PERFORMANCE MODES	COMMUNICATIONS
Speaking Listening Writing	<u>EXAMPLES</u> Telephone Telephone Free <u>astray</u> Freight bill <u>SKILLS/CONCEPTS</u> Terminology Clarity of expression Discriminate facts Word definition Note taking Description Informational reports

Duty F Handling Collections and Accounts Receivable

- 1 Receive money collections from drivers or dispatcher
- 2 File cashier copies of freight bills of inbound shipments
- 3 Make out bank deposit
- 4 Maintain file of customer accounts receivable on current basis
- 5 Determine and handle past due accounts

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(TASK STATEMENT) RECEIVE MONEY COLLECTIONS FROM DRIVERS OR DISPATCHER

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Safe Check-in sheet (drivers) or receipts Adding machine	Check off delivery receipts on driver's check sheet Collect and count money driver collected Balance money actually turned in with what should have been turned in Place all receipts in safe pending bank deposit	
<u>DECISIONS</u> Determine accuracy of receipts	<u>CUES</u> Reconcile money with receipts	<u>ERRORS</u> Mistake in counting or adding

(TASK STATEMENT) RECEIVE MONEY COLLECTIONS FROM DRIVERS OR DISPATCHER

SCIENCE	MATH - NUMBER SYSTEMS	
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension, relaxation, different or clashing values expressed verbally Maintain awareness of physical expressions basic to peak physical performance, the qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization Exhibit qualities of tact, consideration and graciousness, self-confidence, composure, self-control, self-reliance and adaptability Maintain capacity to perceive, quickly integrate and function well in the face of adversity; to cope with conflict behavior Listen openly and attentively in communication process	Whole numbers Decimal fractions Fundamental Operations (Calculation) Addition, Subtraction, Multiplication, Division Use of Numbers (without calculation) Counting, Coding, Recording, Number recognition Use of Computing Devices and Mechanical Aids Adding machine Measurement: non-geometric Time, money	
COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	Receipts	Comprehension Informational reports Detail Terminology
Writing	Paid receipts	Informational reports
Speaking	Voice only	Terminology
Listening	Delivery reports	Note taking

COMMUNICATIONS

(TASK STATEMENT) FILE CASHIER COPIES OF FREIGHT BILLS OF INBOUND SHIPMENTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Cashier copy of freight bill of each inbound shipment Alphabetical file	Read each inbound freight bill to determine local customer's name Place in alphabetical file using customer's name to determine proper placement	
<u>DECISIONS</u> Determine proper placement	<u>CUES</u> File systems	<u>ERRORS</u> Misfiling

(TASK STATEMENT) FILE CASHIER COPIES OF FREIGHT BILLS OF INBOUND SHIPMENTS

SCIENCE	MATH - NUMBER SYSTEMS	
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Use of Numbers (without calculation) Indexing (Alphabetical)	
COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	Freight bill	Comprehension Informational reports

(TASK STATEMENT) MAKE OUT BANK DEPOSITS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Money received Adding machine Typewriter Checks received in mail Rubber stamp - "deposit only"	Count total cash received during a specific period Add cash received to all checks paying bills which are received in the mail during that period Stamp "deposit only" on checks Fill out bank deposit slip Put cash, checks and slip in pouch used in making bank deposit Put pouch in safe place until physical delivery to bank	
<u>DECISIONS</u> Determine accuracy of information recorded	<u>CUES</u> Cash totals Check totals	<u>ERRORS</u> Math errors Putting pouch in unsafe place

(TASK STATEMENT) MAKE OUT BANK DEPOSITS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole Numbers Decimal fractions Fundamental Operations (Calculation) Addition, Subtraction, Multiplication, Division Use of Numbers (without calculation) Counting, Recording, Number recognition Use of Computing Devices and Mechanical Aids Adding machine Measurement of time, money
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Reading	Receipts Money amounts
Writing	Bank deposit slip
SKILLS/CONCEPTS	
Comprehension Informational reports Terminology	
Penmanship Informational reports Terminology	

(TASK STATEMENT) MAINTAIN FILE OF CUSTOMER ACCOUNTS RECEIVABLE ON CURRENT BASIS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Cashier file of uncollected freight bills Checks or confirmation of receipt of checks Adding machine	Pull freight bills already paid to driver at time of delivery Pull freight bills that had been checked Check all unpaid freight bills daily	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Not handling on a current basis

(TASK STATEMENT) MAINTAIN FILE OF CUSTOMER ACCOUNTS RECEIVABLE ON CURRENT BASIS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole Numbers Decimal fractions Use of Numbers (without calculation) Number recognition, Counting, Indexing Fundamental Operations (Calculation) Addition, Subtraction Use of Computing Devices and Mechanical Aids Adding machine Measurement of time or calendar
PERFORMANCE MODES	COMMUNICATIONS
Reading	EXAMPLES Accounts receivable (Freight bills) SKILLS/CONCEPTS Informational reports Comprehension

(TASK STATEMENT) DETERMINE AND HANDLE PAST DUE ACCOUNTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Cashier file Telephone Blank freight bills 'Past due' rubber stamp Adding machine	Pull all past due accounts from cashier file (unless contacted within the week) Contact each customer by phone to check on payment Note date of phone call on freight bill Put account back in cashier file	
<u>DECISIONS</u> Determine past due accounts	<u>CUES</u> Date of billing Company policy	<u>ERRORS</u> Passing over account that is over due Mishandling the customer

(TASK STATEMENT) DETERMINE AND HANDLE PAST DUE ACCOUNTS

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension, relaxation, different of clashing values expressed verbally Maintain awareness of physical expressions basic to peak physical performance, the qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization Exhibit qualities of tact, consideration and graciousness, self-confidence, composure, self-control, self-reliance and adaptability Maintain capacity to perceive, quickly integrate and function well in the face of adversity; to cope with conflict behavior Listen openly and attentively in communication process	Whole numbers Decimal fractions Fundamental Operations (Calculation) Addition, Subtraction Use of Numbers (without calculation) Counting, Indexing, Recording, Number recognition Use of Computing Devices and Mechanical Aids Adding machine Measurement of calendar, money

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Reading Listening Writing	Telephone Freight bills Telephone Memo on freight bill	Terminology Appropriate diction Enunciation Persuasion and sales techniques Terminology Informational reports Comprehension Note taking Recognize opinions Memo format Terminology

Duty G Storing and Retrieving Shipment Information

- 1 Maintain file of freight bills of outgoing shipments
- 2 Maintain file, by shipper, of original bills of lading

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(TASK STATEMENT) MAINTAIN FILE OF FREIGHT BILLS OF OUTGOING SHIPMENTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
File cabinet (current) Storage space outside of office (dead) All outgoing freight bills Microfilm Microfilm projector	Place all new freight bills in the proper sequence (by pro numbers) in the files Remove older bills (over three months old) as file drawer fills up Place bills removed in proper order in outside storage space or microfilm all bills removed and store Be able to produce any needed bill from the past seven years - or reproduce information from it upon request	
<u>DECISIONS</u> When to pull freight bills from current file	<u>CUES</u> File drawer becomes over-crowded	<u>ERRORS</u> Destroying bill before it is microfilmed Misfiling a bill

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Whole numbers Use of Numbers (without calculation) Counting, Indexing [Numerically], Coding [Company], Number recognition Measurement of time [Dates]
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Reading	SKILLS/CONCEPTS Comprehension Informational reports

(TASK STATEMENT)

MAINTAIN A FILE BY SHIPPER OF ORIGINAL BILLS OF LADING

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Original bills of lading File cabinet Outside storage space Separators	Remove bills to lower drawer in office at end of month File all new bills of lading in proper place in files daily Placed by the shipper Keep all bills in office for one year Remove all bills (except current month) from office to outside storage space at end of year Place all bills by year, in storage for seven years	
<u>DECISIONS</u>	<u>CUES</u>	<u>ERRORS</u> Misfiling at any step

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension and relaxation Maintain awareness of physical expressions basic to peak physical performance Maintain awareness of qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization	Use of Numbers (without calculation) Indexing [Alphabetical] Calendar
COMMUNICATIONS	
<u>PERFORMANCE MODES</u> Reading	<u>EXAMPLES</u> Bill of lading
	<u>SKILLS/CONCEPTS</u> Comprehension Informational reports

Duty H Taking All Incoming Phone Calls

- 1 Answer and transfer all incoming calls to proper destination

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(TASK STATEMENT) ANSWER AND TRANSFER ALL INCOMING CALLS TO PROPER DESTINATION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Phone List of all names, titles and extension numbers Pad for taking phone messages	Find out to whom customer wishes to speak or what kind of information needed, such as: Report damaged merchandise Call for dispatcher (for pick-up) Call for trace clerk Call for terminal manager Call for sales representative Call questioning bills Transfer the call or take any messages required	
<u>DECISIONS</u> Determine to whom to transfer the call Determine what information is needed	<u>CUES</u> Customer requests	<u>ERRORS</u> Dissatisfied customer Break down in communications

(TASK STATEMENT) ANSWER AND TRANSFER ALL INCOMING CALLS TO PROPER DESTINATION

SCIENCE	MATH - NUMBER SYSTEMS
Exhibit capacity to ascertain best service for customer Maintain conscious awareness of the need for balance between tension, relaxation, different or clashing values expressed verbally Maintain awareness of physical expressions basic to peak physical performance, the qualities basic to optimal mental performance: attention, observation, concentration, mental clarity and organization Exhibit qualities of tact, consideration and graciousness, self-confidence, composure, self-control, self-reliance and adaptability Maintain capacity to perceive, quickly integrate and function well in the face of adversity; to cope with conflict behavior Grant appropriate regard for customer's unique needs Listen openly and attentively in communication process	Whole Numbers Use of Numbers (without calculation) Recording
COMMUNICATIONS	
PERFORMANCE MODES	EXAMPLES
Speaking	Telephone
Listening	Telephone
Writing	Memo pad
	<u>SKILLS/CONCEPTS</u> Terminology Diction Clarity of expression Persuasion and sales technique Concentration Recognize opinions Note taking Discriminate facts Penmanship Memo format Terminology

GLOSSARY

Accounts receivable - all unpaid freight bills
Bill of Lading (B/L) - contract between shipper and carrier (freight company)
Commodity rate - special rate governing volume or truck load movement between two specific points on a certain commodity
Consignee - person who receives freight that is shipped
Consignor - person who ships freight
Dispatch sheet - large worksheet on which is recorded requests of customers for pick-ups
Expedite freight - anything done to make delivery faster or easier for the customer
Extensions - multiplying weight times rate and recording total price on a bill of lading
Free astray - no charge freight bill
Freight bill - invoice that informs shipper or receiver of the freight charges that are due and that identifies a shipment from pick-up to final delivery
Interline freight - freight that requires the handling of more than one common carrier to reach its final destination
LTL - less than a full truck load
Manifest - list of freight bills loaded on one truck
National Motor Freight Classification (NMFC) - listing of all products and commodities moving by common carriers containing official classification of each item for rate purposes
O. S. and D. - any reference to overage, shortage or damage to merchandise
Origin terminal - the point from which merchandise is first shipped by the carrier (the original pick-up point)
Over-the-road - any shipment sent outside the local area
Pro number - freight bill number assigned by the freight company
Rate split - division of freight revenue between two or more common carriers
Routing - scheduling the order of pick-up or delivery of freight
Tandems - twin axles, each with four wheels mounted on the rear of a semi trailer
Tariff - official price list authorized by the I.C.C. outlining all rates and rules governing the movement of freight between different areas
Tariff supplement - publications of I.C.C. detailing price and rate changes
Tote board - bulletin board that lists all equipment available to a terminal and the locations of that equipment
Trip sheet - driver's list of bills and delivery or pick-up points